

Policy LOC 8 (former Policy LOC 7, Local Bylaw 8)
Duties of local officers

Policy LOC 8 Section 1
Local presidents

Local Presidents will:

1. Act as the chief officer of the local and coordinate the affairs of the local through the other officers and local committees;
2. Be responsible for the efficient and proper conduct of the local;
3. Preside at all membership meetings and executive meetings of their respective locals and is an ex-officio member of all committees of the local;
4. Apply the PSAC Rules of Order to any questions of procedure; and
5. Be the chief spokesperson of the local in its dealings with the employer.

Policy LOC 8 Section 2
Local vice-presidents

Local Vice-Presidents will:

1. Perform the duties of the local president when the president asks, when the president is absent or if the president resigns;
2. Conduct meetings on behalf of the president or assumes the chair when the president vacates it for any reason during a meeting; and
3. Be responsible for certain portfolios or duties as assigned by the president or the executive.

Policy LOC 8 Section 3
Secretaries and treasurers
Secretaries

Local Secretaries will:

1. Be responsible for the administrative duties of the local;
2. Keep accurate records of all meetings of their local;
3. Be responsible for keeping proper files of all documents;
4. Be responsible for maintaining a record of all correspondence relating to their local; and
5. Be responsible for certain portfolios or duties as assigned by the president or the executive

Treasurers

Local Treasurers will:

1. Keep proper files of the financial records of their local;
2. Be accountable for all receivables and payables;
3. Act as one of the local's signing officers;

4. Prepare and submit financial reports at each executive or general meeting;
5. Collect and deposit local funds;
6. Be familiar with and responsible for Component financial policies (e.g. FIN 1);
7. Identify Rand members (dues paying members who have not signed a union card) so that they may be signed up.
8. Be responsible for certain portfolios or duties as assigned by the president or the executive.

Local secretary-treasurers will perform the duties and responsibilities described for secretaries and treasurers, above.

Policy LOC 8 Section 4

Chief stewards

Local Chief Stewards will:

1. Coordinate the work of stewards in their locals and ensure that their members receive advice and assistance on grievances, staffing complaints and related issues;
2. Recruit stewards and where possible organize and chair the steward's committee/network;
3. Work closely with all stewards, executive officers, committees and liaise with component staff; and
4. Be responsible for certain portfolios or duties as assigned by the president or the executive.

Policy LOC 8 Section 5

Local executive health and safety representative

Local executives will name a member of their executive to hold responsibility for health and safety. Ideally, this position will be distinct from other executive positions.

The local executive health and safety representative will:

1. Act as the local representative on health and safety issues;
2. Develop knowledge and expertise on such issues as health and safety legislation, and employers' health and safety plans;
3. Keep current on health and safety matters by subscribing to publications and accessing other resources;
4. Maintain files of materials on health and safety;
5. Keep abreast of information and resources to advance the interests of health and safety for members;
6. Act as the local's liaison with the employer's health and safety coordinator;
7. Advocate for members on health and safety matters by presenting these matters to the employer and the union;

8. Provide health and safety-related input into the local executive's decision-making processes;
9. Develop and promote initiatives that encourage members' participation on health and safety matters;
10. Participate as one of the union's representatives on the joint union-management health and safety committee;
11. Advocate for the development and delivery of a comprehensive health and safety education program in the local and at the workplace;
12. Organize education sessions and sensitization training for local members in conjunction with other local representatives;
13. Promote the National Day of Mourning;
14. Encourage members' attendance and participation at health and safety conferences, courses and events;
15. Report to the local executive on his or her activities;
16. Communicate actively with regional leadership and representatives on the PSAC Health and Safety Committee; and
17. Notify regional leadership—and the Union of National Employees — immediately in the event of an incident related to health and safety in the workplace.

Policy LOC 8 Section 6

Local Human Rights representative

The local Human Rights representative will:

1. act as the local representative on human rights issues;
2. develop knowledge and expertise on such issues as human rights, and employers' human rights plans;
3. keep current on human rights matters by subscribing to publications and accessing other resources;
4. maintain files of materials on human rights;
5. keep abreast of information and resources to advance the interests of human rights for members;
6. Review employer's equity plan on a regular basis;
7. advocate for members on human rights matters by presenting these matters to the employer and the union;
8. provide human rights-related input into the local executive's decision-making processes;
9. develop and promote initiatives that encourage members' participation on human rights matters;

10. advocate for the development and delivery of a comprehensive human rights education program in the local and at the workplace;
11. organize education sessions and sensitization training for local members in conjunction with other local representatives;
12. encourage members' attendance and participation at human rights conferences, courses and events;
13. report to the local executive on his or her activities;
14. communicate actively with regional leadership and representatives on the PSAC human rights Committee; and
15. notify regional leadership—and the Union of National Employees — immediately in the event of an incident related to human rights in the workplace.

Policy LOC 8 Section 7 (New 10/13)

Local Stewards

For many members, the Steward is the face of the union. The Steward is the visible presence of the union in the workplace. He/she works with and interacts with the members at the workplace and represents them in a specific work area. Stewards are elected or appointed within the Local but are not considered to be a member of Local Executive.

Local Stewards will:

1. Act as the link between members and their elected local officials
2. Serve as local builders who unite members, organize locals, and get members involved
3. Deal with management on workers' on issues
4. Get to know the membership they represent
5. Make themselves available to the membership
6. Meet with members to hear individual or group concerns or complaints
7. Be proactive in identifying and solving problems, rather than waiting and reacting to problems
8. Talk informally to supervisors to address members' issues
9. Mobilize members when management breeches the collective agreement, their own policies or the law
10. Provide representation to members on grievances
11. Organize and participate in workplace actions
12. Work with and take direction from local executive and union staff
13. Engage members in union campaigns

Stewards must take the following oath and sign it before assuming their duties:

Steward's Oath

“I, _____, having been appointed/elected as a steward of Local _____ of the Union of National Employees, Public Service Alliance of Canada, solemnly declare that, for my term, I will work with the Officers of the Local to represent the members, and fulfill the obligations and responsibilities of my position as Steward to the best of my ability. I will maintain and uphold the dignity of the union, will always keep confidential all matters concerning the affairs of the union that are brought to my attention, and will promptly deliver to the local or component all monies, records, and other property of the union in my possession at the close of my term.”

The Oath will be administered by a member of the UNE Regionally-Elected Team.

For further information, please see:

Policy LOC 7 – *Standard local bylaws*

LOC Appendices

Include:

- Appendix A: Local Annual General Meeting Checklist
- Appendix B: Local Bylaws Amendment Process

Policy FIN 1 Section 4

A local with annual revenues of up to but not more than \$5,000 will maintain financial records at least equal to a simple cashbook or daily journal and will submit an annual financial statement that has been independently reviewed either on a form supplied by the Union of National Employees or on a copy of the form.

Policy FIN 1 Section 5

Locals with annual revenues that exceed \$5,000 will keep financial records in a double-entry bookkeeping system or equivalent. They will submit a comprehensive audited annual financial statement, independently reviewed in accordance with Bylaw 5. This audited statement will be supported by a copy of the annually approved budget, or by minutes of meetings that contain resolutions authorizing expenditures not approved by the annual budget, or that are in excess of financial limits set by the local's bylaws.

Policy FIN 1 Section 6

Local audits

Audits or independent reviews are to be done by professionally designated accountants who are members in good standing as a CA, CGA or CMA for locals with annual revenues (dues rebates and interest) in excess of \$25,000 or assets valued in excess of \$50,000.

Policy FIN 1 Section 7

Audits or independent reviews for locals with revenues up to \$25,000 and assets up to \$50,000 may be done by two members of the local other than a professionally designated accountant. These persons will neither be members of the local's executive, nor be signing officers for the local.

Policy FIN 1 Section 8

Audits or reviews should include, but are not limited to:

1. verification of bank balances through bank reconciliations and bank confirmation;
2. verification of assets including tracing investments, purchasing of furniture, equipment;
3. verification of receipts and appropriate documentation for expense payments,
4. verification that monies properly due to the Government of Canada or the appropriate provincial governments have been paid; and
5. verification that monies owed to the local are recorded and tracked.

Policy FIN 1 Section 9

A regional vice-president may ask that the national executive direct the national president to order a review of the local's financial records and, if necessary, commission an audit.

Such audits will include, but not be limited to, verification that the local has adhered to its bylaws and that its expenditures have not contravened any provisions of the Union of National Employees' bylaws or policies, including Policy LOC 6, *Expenditure and investment of local funds*.

Following a review or audit by the Union of National Employees, a full report including recommendations will be submitted to the national executive.

Policy FIN 1 Section 10

Staff may help locals meet audit requirements by providing advice and guidance, but this will not satisfy the conditions described in Section 6, above.

Policy FIN 2

Financial assistance to members and locals

Policy FIN 2 Section 1

Grants

The Union of National Employees may make a grant of \$2 per member to a maximum of \$500, but not less than \$100, when a regional vice-president makes such a request or when a new local makes a written request to the Union of National Employees.

Policy FIN 2 Section 2

Loans

A local may receive a loan from the Union of National Employees to a maximum of one-half of the estimated local dues rebate for two years. The loan will be recovered by the component by retaining one-half of each monthly rebate until such time as the loan is repaid. No such loan will be granted without consultation with the relevant regional vice-president.

Policy FIN 2 Section 3

Special loans and grants

An existing local may request—through its regional vice-president to the national executive—special loans and grants. Any such request will be accompanied by the last available financial statement and an indication of the number of members, the estimated local dues rebate and the special circumstances. Requests for special financial assistance are dealt with by the national executive when it reviews local finances. Special financial assistance may be of two types:

Bylaw 5

Money and finances

Finances

Bylaw 5 Sec 1

UNE audits

The financial records of the UNE are audited once a year by a firm of chartered or certified accountants approved by the national executive. When the audit is complete, the UNE immediately forwards one copy of the financial statement to each local and two copies to the Public Service Alliance of Canada.

Bylaw 5 Sec 2

UNE signing officers

The signing officers of the UNE are the national president or, in that person's absence, the national executive vice-president, or the national vice-president for human rights and any of the vice-presidents representing regions within National Capital Region.

In case of emergency, the national executive has the authority to designate one or more of its members as signing officers of the UNE.

Bylaw 5 Sec 3

Terms of employment

- a) The terms and conditions of employment for non-unionized staff at the UNE conform to the classification standards of PSAC. Salary levels will be comparable with salaries negotiated with unionized staff.
- b) Non-unionized staff enjoy the same benefits as those accorded to unionized staff.

Bylaw 5 Sec 4

UNE's and locals' fiscal year

The UNE's fiscal year is from January 1 to December 31. The same applies to all locals.

Bylaw 5 Sec 5

Submitting budgets

The national executive will submit for approval to each UNE National Convention a year-to-year budget for the ensuing three-year period.

Bylaw 5 Sec 6

Retention of financial records

The UNE and its locals should retain all financial records for the legal period prescribed by the *Income Tax Act* as interpreted by the Minister responsible for the Canada Revenue Agency of National Revenue.

Bylaw 5 Sec 7

Local signing officers

Locals will approve at least three and no more than five signing officers, two of whom will sign all cheques. No disbursements may be made that are not in accordance with the local's bylaws.

Bylaw 5 Sec 8

Submission of financial statements

The treasurer of a local will submit a financial statement to all regular meetings of the local.

Bylaw 5 Sec 9

The treasurer will also submit to the UNE, before April 1 of each year, annual financial statements independently reviewed in accordance with Policy FIN 1, *Local finances*. These financial statements cover the previous year ending December 31. The UNE will not remit the refundable portion of dues until its financial statement has been received and approved.

Bylaw 5 Sec 10

Local contracting

No local may enter into any extraordinary financial agreement beyond its day-to-day business operations without prior approval of the National President or National Executive Vice-President. If the Local is not satisfied with the decision, it can refer the matter to the National Executive.

Bylaw 5 Sec 11

Local financial accounting

All financial records of the UNE and its subordinate bodies will be maintained in the following manner: in the case of the national office, by an approved manner as advised by the auditors; and, in the case of each local, by the national executive.